MARYLAND JUDICIARY

GEARS
General Enterprise And Resource Support

Quick Reference Tip Sheet

LAST REVISED DATE: 02/26/2018

General Information

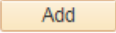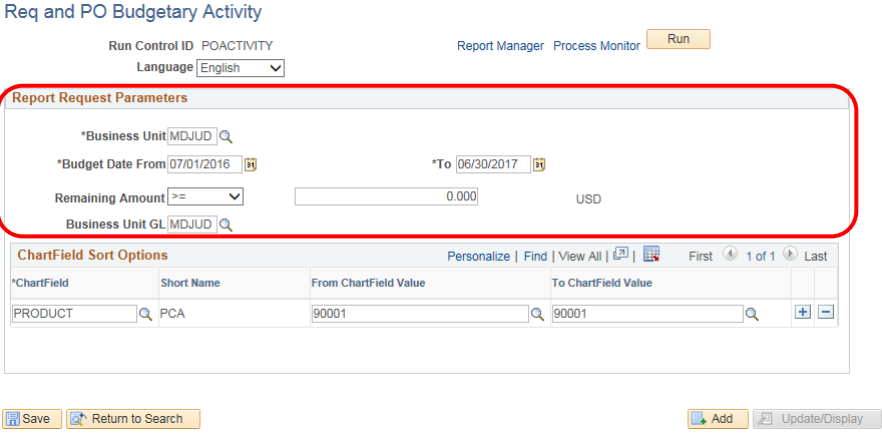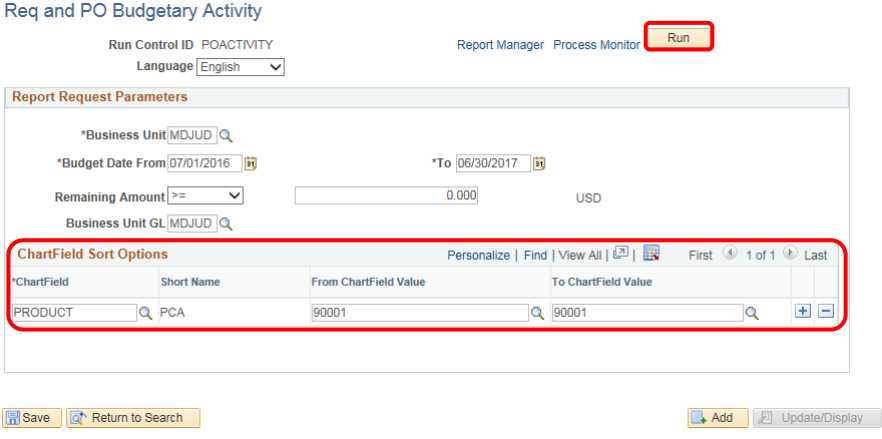| Task	Process Information
Running the Purchase Order Budgetary Activity Report **Note:** If additional assistance is needed, please contact the respective AOC Department staff or the JIS Service Desk.	The **PO Budgetary Activity Report** provides budgetary amount information for purchase orders (POs) according to report request parameters.

GEARS Navigation

Main Menu> Purchasing > Purchase Orders > Reports > Req and PO Budgetary Activity	Main Menu ▾ > Purchasing ▾ > Purchase Orders ▾ > Reports ▾ > Req and PO Budgetary Activity

1.0   Process

This document is intended to provide a quick reference to running the PO Budgetary Activity Report in GEARS.

STEP	ACTION	DETAILS
1.	**Create the Run Control ID.** The first time you run the PO and Req Budgetary Activity Report, you must create a new Run Control ID. Click on the `Add a New Value` tab. **NOTE:** A Run Control ID is the name that will be given to the saved parameters you select for the report. You can run the same report again in the future by selecting the same Run Control ID when using the *Find an Existing Value* tab. No spaces are allowed in the Run Control ID. In addition, the report parameters for a Run Control ID can also be changed after selecting the ID.	**Req and PO Budgetary Activity** `Find an Existing Value` | **Add a New Value** Run Control ID `_____` `Add` **NOTE:** To use a Run Control ID that you previously created, click the tab `Find an Existing Value` and then click the `Search` button. A list of Run Control IDs appear.

2.	Enter a Run Control ID. In this example, "POACTIVITY" is used as the Run Control ID.	Run Control ID POACTIVITY ✕

3.	Click the [Add] button.	

| 4. | Specify the Report Parameters. The [Report Selection Parameters] page displays. The report parameters determine what information appears in the report.

Notes: Fields with an asterisk (*) must be completed. | Req and PO Budgetary Activity

Run Control ID POACTIVITY   Report Manager Process Monitor [Run]
Language English

Report Request Parameters

*Business Unit MDJUD
*Budget Date From 07/01/2016   *To 06/30/2017
Remaining Amount >=   0.000   USD
Business Unit GL MDJUD

ChartField Sort Options   Personalize | Find | View All | | First 1 of 1 Last
*ChartField | Short Name | From ChartField Value | To ChartField Value
PRODUCT | PCA | 90001 | 90001 + −

[Save] [Return to Search]   [Add] [Update/Display] |

Report Request Parameters Fields	Description
Business Unit	Business Unit will always be MDJUD.
Budget Date From / To	Enter the budget period of the fiscal year (e.g., From: 07/01/XX/ To: 07/31/XX).
Remaining Amount	Enter the desired remaining amount. NOTE: (optional) use the dropdown box to limit results based on operator parameters (e.g., greater '>' /less '<' than or equal to '=' a desired remaining amount). If you are attempting to view all transactions with remaining balances, you should select the '<>' (Not Equal to) dropdown and 0.000 amount. This selection will allow open POs with either positive or negative balances to display.
Business Unit GL	Business GL Unit will always be MDJUD.

| 4a. | Specify ChartField Sort Options. Select the ChartField Sort Options Name criteria for your report (by a selection or range of selections you wish to be included in your report).

As an example, you can report on any single or combination of the following fields:

Account (e.g., 0902 – Office Supplies)
Product (PCA, e.g., 40821)
Budget Ref (Appropriation Year, e.g., AY2015) | Req and PO Budgetary Activity

Run Control ID POACTIVITY   Report Manager Process Monitor [Run]
Language English

Report Request Parameters

*Business Unit MDJUD
*Budget Date From 07/01/2016   *To 06/30/2017
Remaining Amount >=   0.000   USD
Business Unit GL MDJUD

ChartField Sort Options   Personalize | Find | View All | | First 1 of 1 Last
*ChartField | Short Name | From ChartField Value | To ChartField Value
PRODUCT | PCA | 90001 | 90001 + −

[Save] [Return to Search]   [Add] [Update/Display] |

NOTE: The more selection criteria entered, the more granular your results will be.

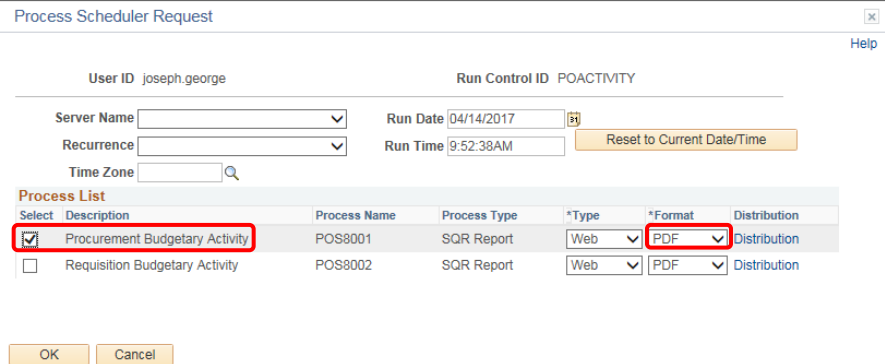|		
	Class Fld (Appropriation Number, e.g., *A0006 – Admin Office of the Courts*) **Fund Code** (Fund, e.g., *0001 – General Fund*) **Operating Unit** (Batch Agency, e.g., *C50 Maryland District Court*) **Program** (e.g., *B005 – Maryland Judicial Conference*) **Project ID** (*NOTE: this field is primarily used with Grants*)	You can select multiple field names. Add/delete field names as needed by using the "**+**" and "**-** "buttons to the right of the line.
5.	**Run the Report.** Click the **Run** button.	
6.	**Schedule the Process.** The **Process Scheduler Request** page displays. **Select/Enter the appropriate criteria:** a. **Click the checkbox ☑ next to the Procurement Budgetary Activity.** b. **Ensure the report Format is 'PDF'.**	
7.	**Click the OK button.**	
8.	**Make Sure The Process Runs.** The **Report Selection Parameters** page displays. **Make note of your Process Instance Number. In this example, the Process Instance Number is 1195774.** **Click the Process Monitor link.**	
9.	**Check the Process Status.** The **Process List** page displays. **Click the Refresh button and continue clicking the *Refresh* button until the Run Status = Success and Distribution Status = Posted.**	
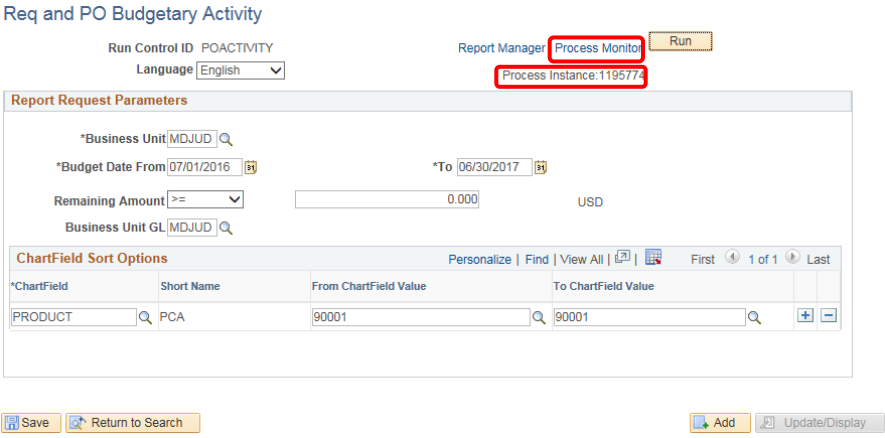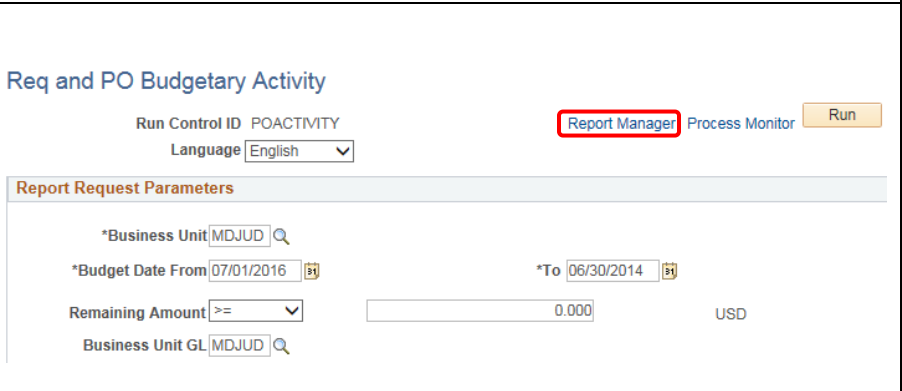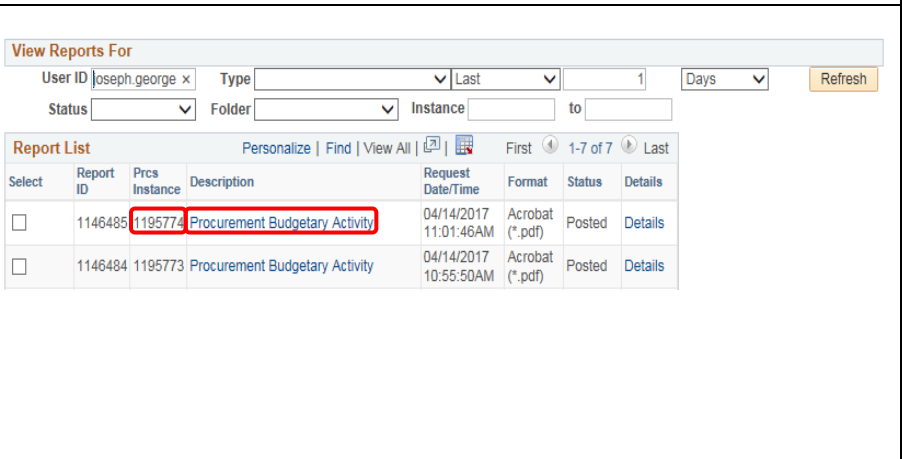
Run Status	Description
Queued	**The process is waiting to run.**
Initiated	**The process has started.**
Processing	**The process is running.**
No Success	**The process did not run, call the Help Desk.**
Warning	**The process ran, but there may be a problem. See if you can retrieve the report, if not, call the Help Desk.**

Success	The process ran successfully.
Distribution Status	**Description**
Queued	The process is waiting to run.
NA	The process is still running.
Posted	The report has posted.
Not Posted	The report did not post, call the Help Desk.

10.	**Retrieve the Report.** Click the Go back to Req and PO Budgetary Activity link to return to the Report Selection Parameters page.

11.	**The Req and PO Budgetary Activity page displays.** Click the Report Manager link.	Req and PO Budgetary Activity Run Control ID POACTIVITY Report Manager Process Monitor Run Language English **Report Request Parameters** *Business Unit MDJUD *Budget Date From 07/01/2016 *To 06/30/2014 Remaining Amount >= 0.000 USD Business Unit GL MDJUD

12.	Click the Administration tab.

13.	**View the Report.** The View Reports page displays. Click the link of the report you wish to view that corresponds to the Process Instance Number that was run. The report will open as a PDF file in a separate window. See below for sample output. ***NOTE:** The report will only include POs that are Approved and have been budget checked with no errors.*	**View Reports For** User ID joseph.george x Type [ ] Last [ ] 1 Days [ ] Refresh Status [ ] Folder [ ] Instance [ ] to [ ] **Report List** Personalize | Find | View All | First 1-7 of 7 Last Select | Report ID | Prcs Instance | Description | Request Date/Time | Format | Status | Details ☐ | 1146485 | 1195774 | Procurement Budgetary Activity | 04/14/2017 11:01:46AM | Acrobat (*.pdf) | Posted | Details ☐ | 1146484 | 1195773 | Procurement Budgetary Activity | 04/14/2017 10:55:50AM | Acrobat (*.pdf) | Posted | Details

14.

```
                                              PeopleSoft Purchasing                                     Page No.  1
Report ID:POS8001                       PROCUREMENT BUDGETARY ACTIVITY REPORT                           Run Date: 04/14/2017
                                                                                                       Run Time: 11:02:01
Business Unit: MDJUD          Budget Date From 01-JUL-2016 To 30-JUN-2017 Remaining Amount >=        0.00  USD
PCA From 90001 To 90001
```

PO ID	Line/Sched/Dist	Vendor ID Vendor Name	Original Amt -	Liquidated Amt =	Remain Amt	Vouchered Amt	PCA
0000051705	1/1/3	0000009091-SMS SYSTEMS MAINTENANCE	136,957.77	136,957.77	0.00	136,957.77	90001
0000051705	3/1/3	0000009091-SMS SYSTEMS MAINTENANCE	9,832.50	9,832.50	0.00	9,832.50	90001
0000051705	3/1/4	0000009091-SMS SYSTEMS MAINTENANCE	19,557.05	19,557.05	0.00	8,205.55	90001
0000051874	2/1/2	0000005455-DALY COMPUTERS INC	5,424.69	5,424.69	0.00	5,424.69	90001
0000051874	3/1/2	0000005455-DALY COMPUTERS INC	6,000.00	6,000.00	0.00	570.45	90001
0000052047	2/1/3	0000012695-PLAN B TECHNOLOGIES INC	14,368.65	0.00	14,368.65	0.00	90001
0000052274	1/1/2	0000012732-ADVANCE DIGITAL SYSTEMS	11,305.00	11,305.00	0.00	11,305.00	90001
0000052557	14/1/2	0000012765-PRESIDIO NETWORKED SOLU	4,000.00	4,000.00	0.00	4,000.00	90001
0000052569	1/1/2	0000005461-FIRST FEDERAL CORPORATI	1,905.49	1,905.49	0.00	1,905.49	90001
0000052625	1/1/2	0000007653-LEIDOS INC	28,015.52	28,015.52	0.00	27,070.86	90001

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